From the Office of Health Informatics

Quick Reference Guide (QRG) SurgiNet – Manage Add On Cases

August 8, 2025

This Quick Reference Guide (QRG) demonstrates the workflow for managing add on cases.

Common Buttons & Icons

Case Manager	**Case Manager** button
	Maximize icon
	New Case icon
	Magnifying Glass icon
	Minimize Window icon
Retrieve	**Retrieve** button
	Case Manager icon
	Cancel icon

Quick Schedule a Case

- **From the Case Selection screen:**

STEP 1: Click **Case Manager** in the toolbar at the top of the page.

STEP 2: Login using network credentials.

STEP 3: Click **OK**.

STEP 4: Click the **Maximize** icon as needed to expand the window.

STEP 5: Click the **New Case** icon.

STEP 6: Search for the patient using one of the identifiers in the Person Search window.

STEP 7: Click to select the correction patient in the results list.

STEP 8: Click **OK**.

STEP 9: Click the **Surgeon** field and enter the name of the surgeon.

STEP 10: Set the Priority using the **Priority** dropdown arrow.

STEP 11: Set the Surgical Area by using the **Surgical Area** dropdown arrow.

STEP 12: Set the OR location by using the **OR** dropdown arrow.

STEP 13: Set the **Start Date**.

STEP 14: Set the **Start Time**.

STEP 15: Set the Encounter Type by using the **Encounter Type** dropdown arrow.

STEP 16: Click **Add**.

STEP 17: Document the Procedure in the **Surgical Procedure** window.

STEP 18: Review the listed Surgeon information for accuracy.

NOTE: **If a change is needed, use the Magnifying Glass to complete a search.**

STEP 19: Set the Anesthesia Type using the **Anesthesia Type** dropdown arrow.

STEP 20: Set the Specialty information using the **Specialty** dropdown arrow.

STEP 21: Document the **Duration** in minutes.

STEP 22: Select the **Primary Procedure** checkbox if applicable.

STEP 23: Select any **Procedure Modifiers** checkboxes if applicable.

STEP 24: Click **OK** in the Surgical Procedure window.

STEP 25: Click **Apply** in the Surgical Case Manager.

STEP 26: Click **OK** to close the Surgical Case Manager pop-up window.

NOTE: **Supply the family members with the case number here so that they can keep track of the case in the waiting room.**

View Added Case Information in Case Selection

- **From the Surgical Case Manager window:**

STEP 1: Click the **Minimize** icon for the Surgical Case Manager window if needed.

STEP 2: Sort cases based on available **Select by** options as appropriate.

STEP 3: Set search filters as appropriate with **Select** by option.

STEP 4: Click **Retrieve**.

NOTE: **Results populate with the new cases at the top.**

Cancel an Add-On Case

- **From the Case Selection screen already logged into Case Management:**

STEP 1: Click the **Case Management** icon in the lower left of the screen.

NOTE: **This icon only appears if already logged into Case Management.**

STEP 2: Click the **Minimize** icon for the **Surgical Case Manager** window if needed.

STEP 3: Click the **Cancel** icon.

STEP 4: Search for the case to cancel.

NOTE: **To search set the Criteria and Select by filters; then click Retrieve.**

STEP 5: Click the case to cancel from the results.

STEP 6: Click **OK**.

STEP 7: Document the surgeon performing the procedure.

NOTE: **If needed, search for a provider using the Magnifying Glass icon.**

STEP 8: Document who requested the cancellation.

STEP 9: Set a cancellation reason using the **Cancellation Reason** dropdown arrow.

STEP 10: Click **OK** in the Cancel Case window.

STEP 11: Click **OK** to acknowledge the Successful Case Cancellation window.